

# Preparing to Staff: Making a Staffing Plan, Developing a PA Schedule, and Interviewing Candidates

## Goal

- To assist participants in determining their staffing needs and in developing the communication skills needed to effectively interview potential candidates.

## Time

4 hours plus breaks

Activities	Teaching Methods	Time
4.1 Welcome & Homework Review	Large-Group Exercise	30 minutes
4.2 Preparing a Job Description	Discussion, Individual Exercise	30 minutes
4.3 Making a Staffing Plan & Personal Assistance Schedule	Discussion, Individual Exercise	45 minutes
4.4 The Interview Process	Interactive Presentation	20 minutes
4.5 Interviewing Skills	Interactive Presentation, Pairs Work, Discussion	45 minutes
4.6 Role Play of an Interview	Role Play, Discussion	60 minutes
4.7 Closing	Discussion	10 minutes

## Supplies

- Nametags and/or card stock table tents
- Participants' completed homework (if applicable) identifying recruitment sources
- Participants' completed "Snapshot of Me and Rough Schedule" (from Activity 3.4)
- Flip chart, easel, markers, tape
- Paper and pens or pencils

**Note:** An overhead projector with transparencies or LCD projector and computer may be used for some presentations, if desired. If you intend to use a projector, make sure you have the necessary equipment and screen. (Some PowerPoint slides are provided on your CD. Others can be made by converting handouts to PowerPoint slides or projecting them in their current formats.)

## Handouts

- Handout 1: Sources to Recruit PAs: Ideas from Homework
- Handout 2: Purposes of a Job Description
- Handout 3: PA Job Descriptions (Samples A and B)
- Handout 4: My House Rules
- Handout 5: My Personal Assistant Job Description
- Handout 6: A Fictional Consumer's Staffing Plan and PA Schedule
- Handout 7: My Staffing Plan and PA Schedule
- Handout 8: To Get the Best Match from the Hiring Process
- Handout 9: In-Person Interviews—Things To Be Sure To Cover
- Handout 10: Decisions Regarding Your Interview
- Handout 11: Application for Employment (Sample)
- Handout 12: Examples of Closed vs. Open-Ended Questions
- Handout 13: Make it Open
- Handout 14: Questions I'd Ask at My Interview
- Handout 15: QC3 Consumer Interview Guide

- Handout 16: *Real*/Listening Is...
- Handout 17: Active Listening
- Handout 18: Lead-Ins for Paraphrasing
- Handout 19: Tips on Ending an Interview

You will also want copies of the fictional consumer “Snapshot and Rough Schedule” you used in the previous session (**Workshop III, Session 3, Handout 5**).

### Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants’ physical needs.

Review the teaching materials for each activity.

Set up the flip chart easel, projector, and other equipment, as necessary, for optimum viewing by all participants. Put out nametags or table tents at each participant’s place.

Post prepared-in-advance flip chart page with **Finding and Hiring Personal Assistants: Goal and Objectives** (see Activity 4.1, step 4) where everyone can see it.

#### **Activity 4.1 Welcome & Homework Review**

Prepare a **flip chart** to log concerns, questions and expectations (step 1).

Prepare a **flip chart** for the parking lot (step 2).

Prepare a **flip chart** with the day’s agenda as shown in step 5.

Copy **Handout 1: Sources to Recruit PAs** for all participants and **prepare a corresponding flip chart page** as shown in step 6.

#### **Activity 4.2 Preparing a Job Description**

Prepare a **flip chart** for “Purposes of a Job Description” (step 2).

Copy **Handout 2: Purposes of a Job Description** for all participants.

Copy **Handout 3: PA Job Description (Samples A & B)** for all participants.

Copy **Handout 4: My House Rules** for all participants.

Copy **Handout 5: My Personal Assistant Job Description** for all participants.

### **Activity 4.3 Making a Staffing Plan & Personal Assistant Schedule**

Copy your fictional consumer’s “Snapshot and Rough Schedule” (**Workshop III, Session 3, Handout 5**), in case any participants have forgotten theirs.

Copy the option you are using of **Handout 6: A Fictional Consumer’s Staffing Plan and PA Schedule** for all participants.

Copy **Handout 7: My Staffing Plan and PA Schedule** for all participants.

### **Activity 4.4 The Interview Process**

Copy **Handout 8: To Get the Best Match from the Hiring Process**” for all participants and **prepare a flip chart page** with the same information as shown in step 1.

Copy **Handout 9: In-Person Interview: Things To Be Sure To Cover** for all participants.

Copy **Handout 10: Decisions Regarding Your Interview**” for all participants, and **prepare a flip chart** as shown in step 3.

Copy **Handout 11: “Application for Employment (Sample)”**

### **Activity 4.5 Interviewing Skills**

Copy **Handout 12: Examples of Closed vs. Open-Ended Questions** for all participants.

Copy **Handout 13: Make It Open** for all participants and **prepare a flip chart page** with a few sample questions as shown in step 3.

Copy **Handout 14: Questions I'd Ask at My Interview** for all participants.

Copy **Handout 15: QC3 Consumer Interview Guide** for all participants.

Copy **Handout 16: Real/Listening Is...** for all participants.

Copy **Handout 17: Active Listening** for all participants.

Copy **Handout 18: Lead-Ins for Paraphrasing** for all participants and **prepare a flip chart page** with questions as shown in step 11.

### **Activity 4.6 Role Play of an Interview**

Copy **Handout 19: Tips on Ending an Interview** for all participants and **prepare a flip chart page** with the information shown in step 3.

### **Activity 4.7 Closing**

**Prepare a flip chart page** to record evaluation scores as shown in step 3.

## Activity 4.1 Welcome & Homework Review

30 minutes

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### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe the workshop goal and objectives, the goal of this session, and the day's agenda;*

*Name at least two sources for recruiting personal assistants (PAs) that they had not considered before; and*

*Describe the strategies they would use for recruiting PAs through those sources.*

### Key Content

- The focus of Workshop III is on finding and hiring personal assistants. Today's Session 4 concentrates on making a staffing plan and interviewing candidates.
- The introductory exercise will revisit how important it is for consumers to explore all possible recruitment options, including community and social networks, advertising, flyers, and ideas that others offer. Using a broad array of options to find a PA strengthens the likelihood that a consumer will have a large pool from which to select applicants. In addition to finding one regular PA, a large pool will enable the consumer to identify possible staff for back-up and emergency coverage.

### Activity Steps

#### Large-Group Exercise—30 minutes

1. **Welcome participants** back to the workshop. Ask if anyone has any comments, concerns, or expectations regarding the last session or this one.

Write these on the flip chart to ensure that they are attended to at the appropriate time.

<p style="text-align: center;"><b>CONCERNS, QUESTIONS AND EXPECTATIONS</b></p>
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2. **Remind participants of the parking lot:** Display a flip chart labeled “Parking Lot” and explain that this will be the place to record issues that come up that are important, but can’t be addressed at the time they arise because of the schedule and your efforts to cover all the topics in the session.

	<p style="text-align: center;"><b>PARKING LOT</b></p>
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3. **Conduct introductory activity:** Welcome participants to this second session of the Workshop, and use an icebreaker to allow everyone to re-introduce him or herself and continue building relationships with one another. *See the “Introductory, Warm Up & Energizer Activities” guide on your CD.*

Explain that this workshop will be highly interactive, and everyone will have a chance to express their thoughts, feelings, and experiences.

4. **Review workshop goal and objectives:** Referring to the prepared-in-advance flip chart page (Finding and Hiring Personal Assistants: Goal and Objectives), review the workshop’s overall goal and what was covered in the previous session: increasing participants’ knowledge and skill in recruiting and pre-screening personal assistance staff, before they begin the interview process.

Note that the focus of today's session is to assist participants in determining their staffing needs and developing the communication skills needed to effectively interview potential candidates.

## FINDING AND HIRING PERSONAL ASSISTANTS

### Goal

After completing the three sessions of this workshop, participants will have the knowledge and skills they need to begin recruiting and hiring their personal assistance staff.

### Objectives

Participants who complete the three sessions of this workshop will be able to:

- Advertise, pre-screen, interview, and hire personal assistants (PAs) who best match and support their needs and preferences.
- Communicate effectively with potential PAs, using active listening skills, including asking open-ended questions and paraphrasing.



5. **Review the day's agenda:** Post the prepared-in-advance flip chart with the day's agenda. Go over activities and break times. Make sure everyone is comfortable with the space and the room temperature.

## TODAY'S AGENDA (SAMPLE)

4.1 Welcome & Homework	11:00 a.m.
4.2 Preparing a Job Description	11:30
4.3 Making a Staffing Plan	12:00 p.m.
4.4 The Interview Process	12:45





Break	1:05
4.5 Interviewing Skills	1:20
4.6 Role Play of an Interview	2:05
4.7 Closing	3:05
Adjourn	3:15

6. **Review homework assignment:** Remind participants about the homework assignment that they were given in the first session of Workshop III, and ask them to pull out **Workshop III, Session 3, Handout 11: My Homework: Sources to Recruit PAs**, if they have filled it out and brought it with them. Their job was to identify two sources for recruiting PAs that they had not considered before and to gather information about them to share with others. Ask if anyone would like to have copies made of his or her filled out forms, collect these, and have them copied for distribution later in the session.

Distribute **Handout 1: Sources to Recruit PAs: Ideas from Homework** and display the prepared-in-advance flip chart page. Invite anyone who has identified sources to recruit PAs but did not fill out their homework sheet to share his or her ideas. Write the first example on the flip chart page, and invite participants to fill out their own Handout 1 with the information being shared. If time allows, invite others to report out their sources.

If some participants have difficulty writing, ask a participant who has filled out Handout I clearly to allow you to copy it for others.

SOURCES TO RECRUIT PAS
Name
How to Recruit There
Whom to Contact
Phone/Email/Address
Costs
Other Details



Ask participants:

*Did this exercise provide you with more ideas about where you can go to recruit candidates?*

*Do you have any questions about how to do this?*

7. **Wrap up discussion:** Emphasize that there are many places to recruit. Encourage participants to network and to try a variety of sources in order to attract as many potential candidates as possible.

## ACTIVITY 4.2 Preparing a Job Description

30 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Understand the purposes of a job description;*

*Explain how they can use job descriptions in recruiting and selecting employees; and*

*Know the content they wish to have in their personal assistant job descriptions.*

### Key Content

- Job descriptions clarify the expectations consumers have of their personal assistants. By maintaining clear job descriptions, consumers ensure that they are aware of their own changing needs and preferences and their current requirements.
- Sharing job descriptions with candidates can be a useful tool in interviews, as job descriptions provide candidates with details about expectations that may help candidates know whether they are interested in the job. Job descriptions can also be the starting point for dialogue.

### Activity Steps

#### Discussion—10 minutes

1. **Recall the process and tools created in this workshop series:** Explain that the next steps—a job description, staffing plan and PA schedule—build on all the individual work participants have done so far, if they have attended the whole series.
  - 1) “My Perfect Day” helped them envision the life they would like to have.

- 2) "My Ideal PA" helped them get more specific and develop their own vision of their ideal personal assistant.
  - 3) "My Assistance Planning List" and "My Preferences List" gave them the information needed to understand more fully what they needed and wanted from a PA.
  - 4) From the lists, they were able to create the "Snapshot of Me," which offered a complete but brief sketch of their needs, and the "Rough Schedule" that began the process of figuring out when and how much time they need PAs to work.
2. **Discuss importance of job descriptions:** Explain that having job descriptions that outline assistance duties can be useful in a number of ways. Ask participants:

*Has anyone ever seen a job description for any job they've ever held?*

If someone says "yes," ask:

*What do you think was the purpose of having a job description for the employer? For the employee? How did you use the job description?*

Use a flip chart to record responses. Invite participants to use **Handout 2: Purposes of a Job Description** if they would like to take notes.

**PURPOSES OF A JOB DESCRIPTION**



3. **Review sample job descriptions:** Ask how many participants already have job descriptions for their PAs. Share both pages of **Handout 3: "PA Job Description (SAMPLES A & B)."** Explain that generous consumers contributed their own job descriptions so that we could create these samples. Ask consumers what they see as the great features of each sample and discuss.

❖ **Teaching Tips**

The two samples are strikingly different. One is very detailed and the other is much more general. Yet each works for the consumers who contributed them as samples. Explore why consumers might choose such different approaches, and how there isn't one right way to do a job description.

Some participants may ask, "Do we *have* to have job descriptions?" They don't *have* to have them for any legal reason. Explain that consumers have reported, though, that they are really very helpful to have at interviews to clarify expectations with candidates. Job descriptions also are a way to ensure that the consumer has thought through all that he or she wants from his or her personal assistants. Additionally, they help establish a more professional relationship between consumers and personal assistants from the start.

4. **Introduce house rules and discuss:** Distribute **Handout 4: My House Rules** and review with participants. Ask them which choices they would make about the items on the list, and if they would make other decisions. Invite additional items that would address "pet peeves" of participants. Explain that, while the rules may be written more strictly as a norm, a consumer could choose to bend the rules if a trusting relationship develops with a great PA. Highlight that this is another way to clarify their preferences and to establish a professional employer/employee relationship with their PAs. Clear expectations also avoid unnecessary conflicts because one or both people assumed something.

#### **Individual Exercise—20 minutes**

5. **Introduce individual exercise:** Invite participants to begin to compose their own job descriptions, explaining that there will not be time to finish them, but that they can begin work on them. Distribute **Handout 5: My Personal Assistant Job Description**. Allow 15 minutes for their individual work. Encourage them to discuss their work with others if they would like, or to concentrate on their own. Circulate among the participants and provide assistance as requested.
6. **Conclude activity:** Announce when the time is up, and invite participants to continue to work on their own job descriptions at home.
7. **Thank participants** for their attention and contributions to the dialogue.

## Activity 4.3 Making a Staffing Plan & Personal Assistant Schedule

45 minutes

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### Learning Outcomes

By the end of this activity, participants will be able to:

*Express clearly their daily, weekly, and occasional assistance and support needs;*

*Explain the importance of developing a staffing plan for personal assistants (PAs), based on their task needs and preferences;*

*Identify staffing options that could meet their assistance needs;*

*Create a staffing plan and a PA schedule that meets their coverage needs; and*

*Explain why it is important to have back-up and emergency coverage when participating in a consumer-directed program.*

### Key Content

- Remind participants (from discussions in prior sessions) that one of the most critical elements for developing an effective working relationship between a consumer and a PA is for the consumer to have a clear and full understanding of his or her assistance needs and preferences—what needs to be done, as well as *how* it should be done by the PA.
- Developing a staffing plan and PA schedule involves identifying what kind of assistance the consumer needs and when it is needed. This helps the consumer know how many people he or she needs in a staffing pool. During the hiring process, consumers will find some people who are good for regular shifts, some for back-up shifts, and others for emergency assistance when regular and back-up PAs are not available.

## Activity Steps

### Discussion—15 minutes

1. **Explain importance of staffing and back-up plans:** Explain that a staffing plan indicates how many staff members are required to cover the days and hours per week that a consumer needs assistance. Regularly scheduled staff should be able to cover all of the consumer's approved hours. Explain that back-up staff are necessary to cover hours when the regular staff person cannot come to work. For example, if someone worked Monday through Friday, noon to 5, but every other Thursday needed two hours off, a back-up PA could fill in. Another example is when a consumer needs assistance outside of regularly scheduled shifts. Family and friends may provide back-up assistance.

Explain that a staffing plan helps consumers think through how many people need to be hired and how many may be needed for back-up shifts.

2. **Introduce "Personal Assistant Schedule":** Note that a "Personal Assistant Schedule" details the exact hours and days each PA will work and is based on the staffing plan. For the most part, this should be a stable weekly schedule, though there may be occasions where it is necessary to make changes, such as when the consumer has an appointment outside regularly scheduled hours or the PA has a conflict.

#### ❖ Teaching Tip

Instructors may want to remind participants that flexibility can help in successful hiring. If the consumer would like someone from 8 AM to noon, but the ideal candidate can only take the job if the hours are 8:30 AM to 12:30 PM, the consumer may want to adjust his or her schedule.

3. **Review fictional consumer's "Snapshot and Rough Schedule":** Ask participants to take out **Workshop III, Session 3, Handout 5: A Fictional Consumer's Snapshot and Rough Schedule** from the last session. Distribute copies to those who don't have it, or just show a copy to the class and read it. Explain that this was created using both the "My Assistance Planning List" and the "My Preferences List" created for the fictional consumer in Workshop I.

❖ **Teaching Option**

When asking participants to find copies of handouts from prior sessions, it's always helpful to hold up your copy of the handout and show them what it looks like. Have extra copies or be prepared to review the handout if participants are having difficulty finding their own copies.

Note that, in the left column of the fictional consumer's "Snapshot of Me," (**Workshop III, Session 3, Handout 5**) the consumer has written the categories of things that must be done and when they need to be done (daily, a few times a week, one a week, or occasionally). On the right, he or she has put the approximate time it takes to do the tasks.

On the second page, the consumer has created a "Rough Schedule" of his or her PA needs. These materials can be a handy way to discuss basic needs during PA interviews.

4. **Review fictional consumer's "Staffing Plan and PA Schedule":**

Distribute the option of **Handout 6: Fictional Consumer's Staffing Plan and PA Schedule** that matches the fictional consumer you have been using throughout the workshops (i.e., Sherry, Irene, or Enrique). Explain that the consumer used his or her "Snapshot of Me" to identify different staffing options. Ask the group:

*With these hours to fill, why did the consumer choose the option she or he did?*

*Why might option one be appealing to PA candidates? Why might it not be appealing?*

*What sorts of candidates might be available to fill the shifts in his or her staffing plan?*

*How might a consumer use community and family supports to create a more appealing schedule?*

❖ **Teaching Option**



An alternative or additional exercise, if time allows, is to have participants brainstorm the pros and cons of:

- Using three PAs
- Using two PAs
- Using one live-in PA

### Individual Exercise—25 minutes

5. **Introduce individual exercise:** Ask participants to bring out their “Snapshot of Me and My Rough Schedule” (**Workshop III, Session 3, Handout 6**) to use as a reference. Distribute **Handout 7: “My Staffing Plan and PA Schedule**. Explain that, using their snapshot and rough schedules, it’s now time to develop a more detailed plan. Ask participants to complete both parts of **Handout 7**. Invite participants who would like to work with a partner to do so. Check in with each participant to make sure he or she understands how to determine the staffing options and then create a schedule. Assist where needed with writing challenges.

#### ❖ Teaching Tip

If participants didn’t complete a “Snapshot of Me” in Workshop III, Session 3 (see Activity 3.4), have them do this here. This may increase the time for this activity by 20 to 30 minutes.

Each participant needs to complete his or her own “Staffing Plan and PA Schedule.” However, if it seems that most will need help, you may be able to form small working groups and assign one facilitator to help each group or encourage participants to help one another with their plans.

### Discussion—5 minutes

6. **Debrief the exercise:** After participants have completed **Handout 7: My Staffing Plan and PA Schedule**, come back together as a group. Reassure those who haven’t finished that they can continue working on their plans at home. Ask if participants have a better understanding of their PA needs. Ask:

*How many people need more than one staff person?*

*Does this affect their recruitment plans?*

*What are some of the ways to have all of their needs met, even if their approved service hours are not as generous as they would like?*

❖ **Teaching Option**

Encourage participants to consider how family members, friends, and volunteers from the community might be recruited to support them so that they can create an attractive schedule—e.g., getting a ride and assistance with going to church on Sundays.

7. **Thank participants for their hard work** and contributions to the discussion.

## Activity 4.4 The Interview Process

20 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe the objectives of the in-person interview; and*

*Begin to consider their answers to the key questions about the interview process: who, where, and what.*

### Key Content

- When hiring a personal assistant (PA), it is important for the consumer to:
  - Be constantly aware of his or her needs and preferences, and to clearly express those needs and preferences to each candidate.
  - Be conscious of what trade-offs and compromises are necessary in order to fill staffing needs.
  - Always be looking for the best match among the candidates who apply for the position.
  - Understand the legal dos and don'ts.
- During the interview, the consumer has many objectives:
  - To get a sense of the candidate as a personal assistant (PA) and as a person, to determine if he or she is a good match.
  - To give the candidate a good (general) sense of the job.
  - To show the candidate that this is a job he or she would enjoy.
  - To start the relationship-building process.
  - To learn the skills the candidate brings to the job.

- To give the candidate an opportunity to ask questions.
- In structuring the interview, the consumer needs to decide: Who will conduct the interview? Where it will be conducted? What will be discussed?

## Activity Steps

### ❖ Teaching Option

Consider starting this activity with an Opinion Poll. This can be an energizer for the group. Use the statement:

*Interviews are a waste of time. People just tell you what you want to hear so they can get the job.*

Follow the steps to present and discuss an Opinion Poll that have been fully outlined in Activities 1.2, 1.5, 2.3, and 3.2.

If you choose to begin Activity 4.4 with an Opinion Poll, you may need to adjust the time (and agenda) to allow for discussion.

## Interactive Presentation—20 minutes

1. **Outline goals of hiring process:** Display the prepared-in-advance flip chart and distribute **Handout 8: To Get the Best Match from the Hiring Process**. Review each point.

### To Get the Best Match from the Hiring Process

#### You need to...

- Be aware of your needs and preferences
- Clearly express your needs and preferences to each candidate
- Be conscious of what trade-offs and compromises are necessary to meet your needs



- Focus on getting closest to the right match and your “must haves”

Remind participants that their hiring goal is to find the best possible match between their needs and preferences and the personality, skills, and availability of potential personal assistants. Ask participants: *What are the goals of an in-person interview?* Add key points to the flip chart.

2. **Review key objectives of interviews:** Distribute **Handout 9: In-Person Interview: Things To Be Sure To Cover** and briefly review each point.
3. **Discuss decisions consumers must make about interviews:** Post the prepared flip chart page and distribute **Handout 10: Decisions Regarding Your Interview.**

### DECISIONS REGARDING YOUR INTERVIEW

- Who should be part of the interview?  
Why?
- Where should interviews take place?  
Why?
- What do you want to learn *from* the candidate?
- What do you want to communicate *to* the candidate about the job and you?
- What materials and props do you want with you?



Ask participants to brainstorm ideas for each question and record their responses. Invite those who would like to take notes to do so on their handouts. Be sure to spend adequate time on the last questions.

4. **Share the sample application form and discuss:** As you discuss the last question, note that some consumers have developed application forms for their PAs to fill out. Distribute **Handout 11: Application For Employment (SAMPLE)**. Briefly discuss the advantages of having such a form.
5. **Summarize planning for an interview:** Conclude this activity by emphasizing that interviewing is a key step in finding a PA who is a good match. Empathize with participants by telling them that many people are uncomfortable with this part of the hiring process. Let participants know that in the next series of exercises, they'll be able to practice some communication skills that will make their interviews more successful.
6. **Thank participants** for the great and thoughtful discussion.

## Activity 4.5 Interviewing Skills

45 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe active listening, including the importance of being aware of body language;*

*Explain the difference between closed and open-ended questions and the importance of using open-ended questions in candidate interviews;*

*Create open-ended questions for interviews; and*

*Describe paraphrasing as a two-way communication skill and explain its importance in interviewing candidates.*

### Key Content

- Good listening is essential to clear, effective communication. In interviewing candidates, it is important to be a good listener and to also be aware of whether the candidate listens well.
- Good listening is active, not passive. Active listening is a skill that must be learned and practiced, since it is not something people have been taught or have often experienced. It involves:
  - Using attentive body language and paying attention to the body language of others (body language refers to the way people communicate nonverbally through postures, facial expressions, and gestures).
  - Asking open-ended questions in order to gather information.
  - Using paraphrasing to ensure mutual understanding.
- Asking open-ended questions and paraphrasing are good ways to learn about PA candidates.
- Closed questions usually generate facts or “yes” or “no” answers. Open-ended questions encourage responses that go into feelings, opinions, or

explanations. Open-ended questions usually begin with “what,” “how,” or why.

- Paraphrasing involves stating in one’s own words what someone else has said. This skill is helpful in clarifying and gathering information and reflecting back what the listener understood. Three of the main benefits of paraphrasing are that people appreciate feeling heard and understood, miscommunication can be prevented, and it can help people to remember what was said. Asking a candidate to restate (paraphrase) his or her understanding of key issues described by the employer is also a good way to test a candidate’s listening skills.

## Activity Steps

### Interactive Presentation—10 minutes

1. **Introduce effective communication skills and techniques:** Explain to participants that communication includes verbal and nonverbal techniques. Emphasize that this works two ways: people communicate with others, and receive communication from others, both verbally and nonverbally.

Explain that by learning effective communication techniques, consumers can more effectively screen candidates. Emphasize that learning as much information as possible about a candidate strengthens the consumer’s ability to make a good hiring choice. Effective communication techniques include helpful ways of asking questions (open-ended questions work better), repeating answers in one’s own words to check understanding (paraphrasing), and being attentive. These communication skills are also vital to building a good working relationship between a consumer and personal assistant (PA) after hiring.

2. **Introduce closed and open-ended questions:** Explain the differences between closed vs. open-ended questions. Distribute **Handout 12: Examples of Closed vs. Open-Ended Questions.** (If using LCD projection, you may want to display this handout as well.)

Review the examples. After each, ask:

*What kinds of answers are you likely to receive with each?*



*How do you imagine an interviewee might react to each type of question?*

3. **Conduct practice exercise:** Distribute **Handout 13: Make It Open** and display the prepared flip chart page with several examples.

**MAKE IT OPEN**

1. Are you trained?
2. Do you have any experiences as a personal assistant?
3. Can you be here in the mornings?
4. Would you buy alcohol if I asked?
5. Can you clean a catheter?
6. Do you like cats and dogs?



Ask participants to practice making open-ended questions using the closed questions provided on the flip chart and **Handout 13**. Write their sample questions on a second flip chart page so that you can use them in the interview role play that follows (Activity 4.6).

Continue until you think participants understand the concept of open-ended questions. Keep this flip chart page available for step 6, when you may add additional questions.

❖ **Teaching Tip**

You may conclude on this activity by offering the following challenge: A consumer prefers a PA who reads a lot. Ask for examples of open-ended questions to explore that skill. They may include: *What kind of books do you enjoy? What have you read lately?*

4. **Introduce behavioral questions:** Explain that a very effective type of open-ended question can be used in interviews to ask candidates to describe how they have handled job-related situations that require the skills and abilities the consumer really desires in a qualified PA. Behavioral questions usually begin with: "Tell about a time..." or "Describe a situation..." Give two examples, such as:

*"Tell me about a time a consumer you were working with went into a medical crisis and how you handled it."*

*"Describe a situation when your car broke down or you had a personal demand that was stopping you from getting to work when you knew your consumer really needed you. What did you do? How did it work out?"*

Invite participants to suggest behavioral questions they would like to ask candidates and discuss briefly.

### **Pairs Work—15 minutes**

5. **Explain pair exercise:** Ask participants to form pairs. Ask them to refer to their "Snapshot of Me and My Rough Schedule" (**Workshop III, Session 3, Handout 6**) and to help each other form open-ended questions for an interview, based on their own preferences. Ask each person to create and write down at least two sample "open-ended" questions. Distribute **Handout 14: Questions I'd Ask At My Interview**, so participants can keep notes. Allow 10 minutes for this activity, and give participants notice when there is a minute or so remaining.

#### ❖ **Teaching Tip**

Participants' level of functioning may require that this activity be modified. The work in pairs can also be done effectively in the large group led by the facilitator.

6. **Facilitate report outs:** Ask each pair to share one open-ended question. Go around the group until each pair has shared at least two questions. Add these new "open-ended" questions to the flip chart page started in step 3 above, for use in the interview role play (Activity 4.6). Suggest to participants that they record questions they like on **Handout 14** under "Good Questions Classmates Suggested ..."

#### ❖ **Teaching Tips**

Ask participants if the new questions you've just added to the list are closed or open-ended. If some are identified as closed, ask a volunteer to restate the question as an open-ended one. Be gentle with this rephrasing process. Initially, many people find it difficult to grasp the difference between closed and open-ended questions.

It is also important to appreciate that some of the questions that participants may ask—or may wish to ask—may feel very personal (e.g., “How do you feel about changing catheters?”). Some participants may not be comfortable sharing these questions in a large group unless this kind of disclosure is appropriately modeled. Trainers are encouraged to demonstrate how to ask personal questions appropriately.

7. **Share sample interview guide from Michigan Quality Community Care Council:** Distribute **Handout 15: QC3 Consumer Interview Guide**. Explain that the Michigan Quality Community Care Council, known as QC3, supports consumers in the Medicaid Home Help program, and they developed this guide to help consumers prepare to interview their PAs, who are called “providers” in this program. Highlight one or two key questions and encourage participants to review the guide and add questions they would like to use in their interviews to their own interview questions.

**Discussion—20 minutes**

8. **Introduce active listening:** Introduce the topic of “checking for understanding.” Ask:

*What is the purpose of listening?*

*How is listening different from hearing?*

9. **Discuss “real” listening:** Invite participants to brainstorm what they think “real” listening is. Ask them what it means for someone to *really, really* listen to them. Record all of their responses on a flip chart.

**REAL LISTENING IS...**



Distribute **Handout 16: Real/Listening Is...** and ask what additional points from the handout participants would like to add to the list.

10. **Discuss active listening:** Distribute **Handout 17: Active Listening** and review the points made. Ask for comments or thoughts from participants.
11. **Introduce paraphrasing** as an important communication technique that allows the listener to check his or her understanding of what a speaker has said. Display the prepared-in-advance flip chart. Ask participants, "What is paraphrasing?" Continue the discussion until a response is agreed to. Write the agreed-on definition on a flip chart. Ask, "How is paraphrasing different from merely parroting what someone has said?" Write responses on the flip chart. Finally, ask, "Why paraphrase?" Answers may include: to be sure you've understood and have the facts straight, to show you're listening, and to identify the feelings or meaning the person expressed. Discuss the responses and record them on the flip chart.

**WHAT IS PARAPHRASING?**

  

**HOW IS IT DIFFERENT FROM  
PARROTING?**

  

**WHY PARAPHRASE?**



12. Distribute **Handout 18: Lead-Ins for Paraphrasing** and review quickly.
13. **Demonstrate paraphrasing:** Invite participants to imagine asking a candidate:

*What qualities do you have that you think will make you a great PA?*

The candidate replies: *I really like people, I'm careful when I'm helping someone, and I'm totally trustworthy.*

Suggest this paraphrase: *OK, so what I heard you say is that you enjoy working with others, do your job carefully, and I can trust you to be honest and dependable. Is that right?*

Ask participants if this paraphrase serves the purposes that have been outlined on the flip chart and discuss. Invite other paraphrases of the candidate's reply and discuss the value they add to the conversation.

- 14. Practice paraphrasing with participants:** Read with animation the following replies from candidates to consumer questions during interviews. Ask different volunteers to paraphrase each one, using the "lead-ins" on the handout. Encourage participants to paraphrase for facts, feelings or the meaning behind what people say. Discuss the value of the paraphrases they suggest. Do as many as you have time for and until it's clear that participants understand what paraphrasing is and how to use it.

*"I've never helped anyone in that way, but it can't be that bad!"*

*"I cared for my grandmother for a year before she died. I never felt more fulfilled than when I was looking after her."*

*"You won't have to train me. I'm experienced!"*

*"The most frustrating thing about my last job was that she never had the supplies we needed, and she expected me to make do. It drove me crazy!"*

*"You can count on me to be here on time, every day."*

*"You don't have to worry. With my experience and training, I know just how to take care of you!"*

*"My family knows how important the job is, so they won't cause me to be late or absent."*

- 15. Wrap up this discussion:** Summarize this experience by emphasizing that paraphrasing skills can be used both by consumers and personal assistant candidates to ensure that important details are accurately communicated. During an interview, for example, a consumer may want to ask a candidate to

repeat back key information concerning job requirements in his or her own words to ensure that the candidate has understood.

16. **Thank participants** for listening attentively and being engaged in the activity.

## Activity 4.6 Role Play of an Interview

60 minutes

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### Learning Outcomes

By the end of this activity, participants will be able to:

*Describe the impact of active listening, including asking open-ended questions and paraphrasing, on the interview process;*

*Demonstrate active listening skills in an interview role play; and*

*List the important steps for closing an interview.*

### Key Content

- Practicing active listening skills in interview role plays provides participants with an opportunity to develop their skills in a safe environment.
- Asking open-ended questions and paraphrasing during an interview encourages the candidate to talk more fully and offer more details. This gives the consumer a better sense of whether the candidate will make a good match.
- When ending an interview, it is important that both the consumer (interviewer) and PA candidate understand what the interviewer will do next (e.g., see two more candidates and decide whom to call back for a second interview) and what the candidate should do next (e.g., think about the job's responsibilities and call the interviewer at a particular time the next day if he or she is still interested or has additional questions).
- Second-best and third-best candidates can be considered for back-up and emergency coverage.

## Activity Steps

### Role Play—10 minutes

1. **Conduct a sample role play:** Referring to interview questions created by the group in Activity 4.5, role-play (with a co-instructor or volunteer you've asked ahead of time) an interview between a consumer and a PA candidate. Be sure to use active listening, including open-ended questions and paraphrasing in the simulation. Also act out some less desirable techniques, such as closed questions or "loaded" questions that convey a judgment, opinion or answer, to discuss with participants.

#### ❖ Teaching Tips

To develop the fictional candidate role, use one of the sample respondents from the phone pre-screening exercise (**Workshop III, Session 3, Handout 10**).

Model steps for ending an interview as outlined in **Handout 19: Tips on Ending an Interview**. These steps will be discussed following the role play.

### Discussion—10 minutes

2. **Facilitate discussion about the role play:** After the role play, facilitate a discussion by asking participants:

*Overall, how did the interview compare with the interviews you've conducted?*

*Which of the consumer's questions were most effective in getting information?*

*Which were not very effective and why?*

*Did you notice paraphrasing during the interview? When?*

*What did you notice about the consumer's and candidate's nonverbal communication? Give examples.*

*Did the consumer and PA candidate each demonstrate active listening? Were there times they did not?*



*What else did you notice?*

3. **Discuss the end of the interview:** Ask what participants noticed about how the interviewer ended the interview. Distribute **Handout 19: Tips on Ending an Interview** and display a prepared-in-advance flip chart page based on the same information. Compare the tips with what happened in the role play.

#### TIPS ON ENDING AN INTERVIEW

Thank the candidate for meeting with you.

Ask if she or he has any other questions.

Communicate clearly with the candidate about your next steps.

Give a specific message to the candidate for him or her to think about.



#### Role Play—30 minutes

4. **Introduce role play practice:** Explain that, in order to practice interviewing skills, participants will have a chance to role-play conducting an interview. Ask for a volunteer to play the consumer with the instructor playing the candidate. Refer to the **Workshop III, Session 3, Handout 10: Telephone Pre-Screening** and choose one of the candidates from the exercise for the consumer to interview, or have the participant describe the candidate they want to interview.
5. **Set up the role play with the volunteer:** After positioning the “consumer” and the “candidate” for the role play, ask the consumer:

*Who would you like to have with you at this interview, if anyone? (If they want someone with them, ask another participant to join in.)*

*Where will this interview be conducted?*

*What points do you want to be sure to cover—e.g., questions related to your PA schedule or your personal preferences assessment?*

❖ **Teaching Tips**

If you have two instructors, one of them can play the role of the candidate in these role plays, while the other observes and leads the discussion.

Set up the role play in a place in the room where everyone can hear and see. Remind the players to speak loudly enough for everyone to hear them.

Remind participants about using open-ended questions to solicit more information.

Introduce the following intervention technique: If the "consumer" gets stuck, the instructor who is facilitating discussion can – with permission – gently put her hand on the consumer's shoulder and ask participants to help out by offering suggestions on questions to ask. By putting his or her hand on the role-player's shoulder, the instructor is indicating, "You're not alone; I'm here to help you out." This can be a useful technique if a participant gets stuck, nervous, or frustrated in the role play because it often has a calming effect.

6. **Conduct role play:** Conduct the role play for about five minutes and then stop. Acknowledge that the interview is not finished, but this is a good time to discuss where the interview is going and if there are ways to improve the communication.

7. **Debrief the role play:**

Ask the participant who role played the consumer:

*How did you feel about the quality of the information you were getting from the candidate?*

*Could you make a decision now about whether this is someone you would want to hire?*

If yes, ask the group: *Which questions were most revealing?*

If no, ask the group: *What do you still want to know and what questions would you add?*

8. **Complete role play if appropriate:** If the interview is not complete, ask the consumer to continue the role play for a few more minutes. Using the questions suggested by the group, encourage the consumer to try to elicit the information that he or she still wants to know.

9. **End the role play and debrief:**

First ask the interviewer(s) to reflect on their interview(s). Ask:

*What questions were most helpful?*

*Would the interviewer(s) consider hiring the candidate?*

Next ask the group if they were happy with the quality of information that the interviewer(s) solicited. Ask:

*What observations do you have about the communication skills used?*

Next ask the candidate:

*Would you want to work for this consumer? Why or why not?*

10. **Conduct additional role plays** – As time allows, repeat steps 5 through 9 with additional participants.

❖ **Teaching Option**

If more than six consumers are participating in the workshop, you may want to split into two groups to do the role-play exercise. Have one facilitator work with each group, and bring the groups back together for the final discussion.

**Discussion—10 minutes**

11. **Thank the volunteers and wrap up.** Reinforce what the participants did well, in terms of interviewing steps and skills. Remind them of the important points regarding ending the interview:

- Thank the candidate for his or her time and interest—no matter how well the interview went.
- Explain next steps, including when you will get back to them regarding your decision.
- Leave candidates with a clear message for consideration (e.g., ask the applicant to think carefully about the responsibilities and commitment of the job).

12. **Explain the importance of a positive ending to interviews:** Facilitate a short discussion about back-up and emergency care and why it is important to end interviews positively and think ahead about future staffing needs. Ask participants for ideas on using the second- and third-best candidates.

13. **Thank everyone** for their attentiveness and contributions to the discussion.

## Activity 4.7 Closing

10 minutes

### Learning Outcomes

By the end of this activity, participants will be able to:

*Identify their level of comfort in screening and interviewing candidates;  
and*

*State what they will be working on at home before the next workshop and  
what their next steps will be for additional training and follow up.*

### Key Content

- Providing closure to the day is an essential part of learning. This time allows the instructor to wrap up the day's discussions, answer additional questions, and convey the next steps to the group.
- The end-of-day wrap-up also allows participants to share what they learned and reflect on how the workshop has affected their lives. Finally, it gives participants the chance to do an informal evaluation for the instructor about which parts of the workshop were most useful and which could be improved.

### Activity Steps

#### Discussion—10 minutes

1. **Introduce closing and check on learning:** Explain that today's workshop is coming to an end. Ask participants what concerns they still have about interviewing PA candidates. Make sure everyone has a chance to speak. Ask if they now feel more confident about interviewing PA candidates.
2. **Encourage practice and explain homework:** Emphasize to participants that, with practice, their interview skills will improve. They can practice good communication skills, particularly asking open-ended questions and paraphrasing, in all types of situations. Before the next session, however, you

are asking them to make a special effort to practice a PA candidate interview. Then explain the homework assignment.

**Homework**—Ask someone you feel comfortable with (a friend or family member) to role-play an interview with you. Have your partner play the PA candidate. Using open-ended questions from Activity 4.5, spend about 10 minutes doing an interview. Think about what questions were most successful in helping you to determine if this person would be a good match for you and be prepared to report out about them at the next session.

3. **Conduct a quick evaluation:** Ask participants, “How much of today was a good use of your time?” Invite them to vote for one of the percentages you have listed on a prepared flip chart as shown below.

After they’ve voted and you’ve recorded the responses (praising those who gave lower rankings for their honesty), ask them to tell you what worked really well for them—the highlights—and what they think could be better—the “low-lights.” Record ALL answers on the flip chart. Ask clarifying questions to be sure you understand the points being made.

<b>SESSION EVALUATION</b>	
____ 25% ■ ____ 50% ■ ____ 75% ■ ____ 90%	
<u><b>Highlights</b></u>	<u><b>Things to Improve</b></u>



4. **Thank participants who gave specific feedback, both positive and critical**, and emphasize that it will help you improve future sessions.
5. **Thank everyone and highlight future sessions:** Explain your future plans. If you are offering Session 5, explain that the next session will focus on the steps involved in hiring the personal assistants participants select after interviewing candidates—including checking references, making an offer, rejecting candidates, and developing a hiring agreement. Remind those who plan to take the next session to bring their binders and materials. Give date and location of next session.
6. **Adjourn:** A fun way to draw the session to a close is to call for a motion to adjourn and invite all who agree to say, "Aye!"
7. **Celebrate**, as appropriate.